



15 MAY 2026

# Head of Legacy Management

## Role Description

### About MiExact

MiExact is a leading life-events data intelligence business. We exist to help organisations stay close to the people they serve through life's most significant moments – because when people's lives change, relationships are most at risk of being lost.

At the heart of MiExact is a unique set of life-event signals – from moving home, to retirement, to death. We combine data, technology and specialist expertise to help organisations recognise important moments early and respond with accuracy, care and confidence.

We transform data into high-value insight and intelligence for clients across the sectors we serve, including charities, credit reference agencies, pension providers and financial services organisations. We are proud to work closely with most of the UK's best loved charities as well as many household brands.

A key part of MiExact is Legacy Link – the UK's largest legacy management team. Legacy Link supports more than 150 charities every month through a combination of outsourced legacy administration, interim resource support and specialist consultancy. Through our team of more than 50 experienced consultants, we help charities secure over £200m of legacy income each year.

We are looking for an exceptional sector leader to lead this business area – providing strategic direction, operational oversight and commercial leadership as Legacy Link enters its next phase of growth.

MiExact has grown rapidly in recent years through a series of mergers and acquisitions, bringing together highly respected specialist businesses including Legacy Futures, Legacy Link and Smee & Ford – organisations that have helped shape and professionalise the UK legacy giving market over many decades.

This is an exciting moment to join the business as we begin a new three-year strategy and build the next chapter of a category-defining organisation.

## Legacy Management Services

### Long term outsourcing

We support charities who have a regular number of legacy cases open at any point but generally not sufficient to be able to easily secure a qualified in-house resource to handle it appropriately. We pick up all aspects of the role and liaise with the executors and charity management to ensure any income is maximised and received as early as it can be.

### Short term role cover

For those charities with existing teams in place, we provide cover for periods where staffing levels are below what is needed. This might be for a maternity or vacancy gap, or to cover a short-term influx of work. We seamlessly fit in with the existing team for as long as might be needed, whether this be weeks or months.

### Consultancy

Through our knowledge of the sector we are able to support charities who need to review or implement policies and procedures in relation to their legacy administration. We offer a detailed healthcheck report to provide comfort on appropriateness of the existing systems with recommendations to improve them.

## Role Purpose

We are looking for an experienced and commercially minded leader to lead the next phase of growth and development for Legacy Link, our specialist legacy management consultancy team.

Leading a team of more than 50 consultants and managers, this role is responsible for shaping a high-performing, client-focused operation that delivers exceptional service to charities while evolving to meet the changing needs of the sector.

Reporting to the Chief Operating Officer, the successful candidate will combine deep sector expertise with strong leadership capability, bringing the credibility to influence externally alongside the operational and commercial focus needed to lead transformational change internally.

The role will include a management of the team and oversight of key relationships with charity partners. We are seeking someone who will be looked to as an influencer in the sector and able to provide a voice of authority and support to other charities that fits in with our desire to be a 'trusted partner'. As such, you will be respected by our charity clients and Legacy Link consultants alike and be able to give direction and guidance on legacy administration best practice. You will work with the Chief Operating Officer in order to look for ways to develop the existing proposition and keep it relevant for charities in a changing landscape.

This is a role for someone who is comfortable operating in a dynamic and evolving environment – able to balance people leadership, client relationships, operational excellence and commercial performance, while bringing teams with them through change in a positive and engaging way.

A key part of the role will be helping shape how technology, process improvement and new ways of working support the future of legacy management. Working closely with Product Development and wider business leadership, you will help ensure Legacy Link remains at the forefront of best practice and innovation within the sector.

The role will be full-time, working flexibly 5 days a week. We do not expect someone to work set days/hours but generally office hours is preferred.

## Overview of the Role

- Senior leadership role within the Legacy Link team, with five direct reports
- Leads and develops the Legacy Link team, including both Senior and Developing consultants
- Reports to and works closely with the Chief Operating Officer (who has overall responsibility for the Legacy Link team)
- Leads the strategic development and operational performance of the legacy management part of the business
- Creates a high-performing, engaged and adaptable team culture
- Drives continuous improvement across service delivery, systems and ways of working
- Balances client excellence with commercial performance and sustainable growth
- Acts as a senior ambassador for the business across the charity and legacy sector
- Highly client-facing: involved in pitches, consultancy projects, senior-level presentations and public speaking
- Works closely with Notifications, Client Services, Consultancy and Research leadership
- Acts as a centre of excellence for Legacy Management across the whole business

## Key Responsibilities

### Leadership & Management

- Managing the five supervisors, and indirectly the team of consultants (both employed and external) with day-to-day matters arising
- Leading and supporting managers through organisational and operational change
- Creating a culture of accountability, collaboration and continuous improvement
- Recruitment, induction and on-going training of consultants
- Developing future leaders and strengthening management capability across the team

### Operational Delivery

- Ensuring best practice guidance and overseeing quality standards for our employed and non-employed team of consultants
- Identifying opportunities to improve scalability, efficiency and client outcomes
- Using data, reporting and operational insight to improve decision making and performance
- Improving reporting processes to help our charities understand the impact of our work
- Leading the Healthchecks performed for charities, and overseeing the end result reports issued

### Commercial

- Along with the Chief Operating Officer, taking responsibility for the budgeting, forecast and actual revenue and gross margin for the Legacy Link team.
- Owning operational delivery against revenue, margin and client satisfaction targets

- Supporting the development of new propositions, services and technology-enabled approaches

## **Client & Sector Engagement**

- Liaising with new and existing charities on specific matters arising
- Attending and presenting at team and / or face-to-face client presentations
- Regularly supporting marketing and business development opportunities such as writing content for our website, speaking at conferences, webinars or on wider group presentations
- Supporting the Client Relationship Manager with proposals, contracts and placement of consultants within charities.

## **Required Skills & Experience**

### **Essential**

- Significant experience in legacy management within the charity sector, with a minimum of 10 years' relevant experience
- A relevant qualification in Legacy Management (ILM CiCLA, Diploma, STEP qualification or equivalent)
- Strong leadership skills, with a proven track record of building, leading and developing high performing teams.
- Experience leading teams through organisational or operational change
- Strong commercial awareness and client-centric mindset
- Exceptional knowledge of the key systems and CRMs used (specifically FC4, but also TQ, RE and Care are useful)
- Methodical and persistent, exceptional attention to detail
- Good communication skills – both written (reports, presentations, media articles, blogs) and verbal
- Confidence in presenting to charities and senior stakeholders
- Tenacious in drilling into the heart of an issue with charities while maintaining excellent relationships with the client
- Ability to work independently and operate effectively in a fast-moving environment
- Comfortable challenging assumptions, processes and conclusions in a constructive and professional way
- Track record of setting standards and raising the quality of thinking across teams

### **Desirable**

- Strong working knowledge of charity IT systems and the ability to support consultants with system access and troubleshooting
- Advanced Excel and PowerPoint skills

- Experience contributing to business development, consultancy projects or sector thought leadership
- Already recognised as a leader in the charity sector will be an advantage

## About You

You are an experienced leader with deep expertise in legacy management and a strong reputation within the charity sector. You will be at the top of your game having worked in a charity setting managing legacy gifts for at least 10 years, with a full working knowledge of First Class 4, and have completed the ILM CiCLA or equivalent.

Alongside your technical credibility, you bring the leadership capability to inspire teams, build trust and lead positively through change. You will already be respected amongst your peers, and committed to delivering the best standard of donor care through exceptional legacy management and oversight.

You are comfortable operating in a fast-moving commercial environment and understand how to balance service excellence, operational performance and sustainable growth. You combine strategic thinking with a practical, delivery-focused mindset and are motivated by improving outcomes for both clients and colleagues.

You are someone who brings people with you – creating clarity, accountability and engagement during periods of change and transformation. You are confident challenging established ways of working constructively, while maintaining strong relationships and a collaborative culture.

To succeed in the role you will be flexible, hard-working and able to work independently. Crucially you will understand the need to work efficiently and accurately, providing our charities with excellent value for money and the best customer service available.

Along with this you will bring a commercial acumen and an appreciation of the need to continue to grow the impact we can have for charities, while balancing this with delivering a return to shareholders. You will embrace change and growth positively and enthusiastically.

You will also commit to the organisation's desire to be a 'trusted partner' for the sector, as an overall priority.

## How to apply

Please send your CV and a covering note explaining why you think you would be right for this role. The application deadline is 29th May. Interviews will be via either Teams or in person in the first two weeks of June.